

Citizens Advice Torrige, North, Mid & West Devon (TNMWD) Privacy Policy

At Citizens Advice we collect and use your personal information to help solve your problems, improve our services and tackle wider issues in society that affect people's lives.

We only ask for the information we need. We always let you decide what you're comfortable telling us, explain why we need it and treat it as confidential.

When we record and use your personal information we:

- only access it when we have a good reason
- only share what is necessary and relevant
- don't sell it to anyone

At times we might use or share your information without your permission. If we do, we'll always make sure there's a legal basis for it. This could include situations where we have to use or share your information:

- to comply with the law - for example, if a court orders us to share information. This is called 'legal obligation'
- to protect someone's life - for example, sharing information with a paramedic if a client was unwell at our office. This is called 'vital interests'
- to carry out our legitimate aims and goals as a charity - for example, to create statistics for our national research. This is called 'legitimate interests'
- for us to carry out a task where we're meeting the aims of a public body in the public interest - for example, delivering a government or local



authority service. This is called 'public task'

- to carry out a contract we have with you - for example, if you're an employee we might need to store your bank details so we can pay you. This is called 'contract'
- to defend our legal rights - for example, sharing information with our legal advisors if there was a complaint that we gave the wrong advice

We handle and store your personal information in line with the law - including the General Data Protection Regulation and the Data Protection Act 2018.

You can check our [main Citizens Advice policy](#) for how we handle most of your personal information.

This page covers how we, as your local charity, handle your information locally in our offices.

How Citizens Advice TNMWD collect your data

We have projects where the collection of data differs from the national policy. These are listed below:

Charging for Care project client data is collated on DCC case management system. Consent given by client.

What Citizens Advice TNMWD ask for

[see our national Citizens Advice privacy policy](#)

How Citizens Advice TNMWD use your information

To find out how we use your information, [see our national Citizens Advice privacy policy](#)

Working on your behalf



When you give us authority to act on your behalf, for example to help you with a Universal Credit claim, we'll need to share information with that third party.

Commonly, when acting on the clients behalf, we share information with Local Authorities, Housing Associations and other local organisations.

How Citizens Advice TNMWD store your information

All client information is stored on the national Citizens Advice case management system 'Casebook'. We use a cloud based system called Microsoft 365 to store information related to HR, volunteer data and client complaints. We use Sage 50 Accounts Professional and sage 50 payroll, both of which are password protected. Paper files are kept in lockable cabinets within our offices.

How Citizens Advice TNMWD share your information

West Devon Money advice project – clients referred to TNMWD by WDBC by a data sharing agreement. Client data is shared via password protected system and/or egress.

Contact Citizens Advice TNMWD about your information

If you have any questions about how your information is collected or used, you can contact our office.

Email: info@ruraldevocab.org.uk



**Torridge, North,
Mid & West Devon**

Telephone: 01271 312945, Monday to Friday 9am-5pm

You can contact us to:

- find out what personal information we hold about you
- correct your information if it's wrong, out of date or incomplete
- request we delete your information
- ask us to limit what we do with your data - for example, ask us not to share it if you haven't asked us already
- ask us to give you a copy of the data we hold in a format you can use to transfer it to another service
- ask us stop using your information

Who's responsible for looking after your personal information

The national Citizens Advice charity and your local Citizens Advice operate a system called Casebook to keep your personal information safe. This means they're a 'joint data controller' for your personal information that's stored in our Casebook system.



Each local Citizens Advice is an independent charity, and a member of the national Citizens Advice charity. The Citizens Advice membership agreement also requires that the use of your information complies with data protection law.

You can [find out more about your data rights on the Information Commissioner's website](#)